

Grade Promotion in PDS Church Office

Updated: 08/09/2024

Note: Creating a backup before performing the actual Grade Promotion is recommended.

Clean-up process for people with ages over 18 and a value in the grade field:

1. Open Church Office.
2. Navigate to the location of the Member Basic List report by:
 - A. Clicking on Information near the top of the screen
 - B. Clicking on Members
 - C. Clicking on Reports on the blue column on the left side of the screen
 - D. Clicking on Listing Reports to show the reports in that folder
3. Click on Member Basic List report
4. Click on Next 2 times
5. Change the printer in the drop-down box if desired. "Default" should be your Windows default printer.
6. Click on Next 2 times
7. On the Select Members Screen, look for a filter under the List of Selections heading named "Age over 18 with grade and Active".
 - If you see the "Age over 18 with grade and Active" filter there, verify that it has the following setup:
 - Selection Information tab:
 - Sort Order: Name
 - "Include Family Marked as Loose Collections" checkbox should not be marked. Unmark that checkbox if necessary.

- Under the “Include the following Members” heading:
 - Active should be marked
 - “Both” should be marked for:
 - Parishioners and Non-Parishioners row
 - School row
 - Daycare row
 - Also under the “Include the following Members” heading, the Deceased Members checkbox should be not be marked. Unmark that checkbox if necessary.
 - Member Selections tab: should have “Include ALL members” marked.
 - Additional Selections tab - Should have:
 - 1st line: “Choose records where All of the conditions in the following sub-section are true”
 - 2nd line: “Mem.Age is greater than 18 and”
 - 3rd line: “Mem.Grade is not equal to _____”
 - 4th line: “< Click here to add new condition >”
- If you do not see the “Age over 18 with grade and Active” filter there, create that filter by doing the following:
 - A. Click on the Add button toward the lower left corner of the screen.
 - B. On the right side, on the Selection Information tab, type “Age over 18 with grade and Active” (without the quotes) into the Name box.
 - C. Select “Shared” in the Access drop-down box.
 - D. Under the Sortation heading, select Name in the Sort Order drop-down box.
 - E. “Include Family Marked as Loose Collections” checkbox should not be marked. Unmark that checkbox if necessary.
 - F. Under the “Include the following Members” heading:
 - 1) Mark Active

- 2) Mark “Both” for each of the following:
 - Parishioners and Non-Parishioners row
 - School row
 - Daycare row

- G. Also under the “Include the following Members” heading, the Deceased Members checkbox should be not be marked. Unmark that checkbox if necessary.

- H. Click on the Save button toward the lower left corner of the screen.

- I. Click on the Member Selections tab.

- J. “Include ALL members” should be selected on the Member Selections tab.

- K. Click on the Additional Selections tab.
 - a. Click on “< Click here to add new condition >”

 - b. Under the Mem heading, click on Mem-Basic to open it.

 - c. Click on Age

 - d. Click on “is equal to”

 - e. Click on “is greater than” in the list

 - f. Click in the blank underlined space to the right of “is greater than”

 - g. Type 18

 - h. Click on “< Click here to add new condition >”

 - i. Under the Mem heading, click on Mem-Basic to open it.

 - j. Click on Grade

 - k. Click on “is equal to”

 - l. Click on “is not equal to” in the list. (No further action is needed for this criteria line.)

 - m. Click on the Save button toward the lower left corner of the screen.

8. With the “Age over 18 with grade and Active” filter selected, click on the Preview button to run the report.
9. Click on the Print button.
10. You may print this using the printer shown near the top left corner of the screen or use the Print to File to save the results as a .pdf file.

- To print the results physically, click on the OK button.

OR

- To save as a .pdf file:
 - A. Mark the “Print to File” checkbox near the lower left corner of the window.
 - B. Make sure that “Adobe Acrobat (.pdf)” is showing in the Type drop-down box.
 - C. The “View the File” checkbox should not be marked. Unmark that checkbox if necessary.
 - D. The “Open Folder” checkbox should not be marked. Unmark that checkbox if necessary.
 - E. Click on the button with the 3 dots on the far right of the “Where:” line.
 - F. Navigate to the location where you would like to save the .pdf file. The “Save in” box near the top of the window shows the current folder. You can use the folder icon with the upward green arrow to the right of that box to move up to a higher level folder.
 - G. Modify the text in the File Name box to the desired file name.
 - H. Click on the Save button to the right of the File Name box. (That only saves the location and name, not the file itself.)
 - I. Click on the OK button. The .pdf file will be generated.

11. Click on the Close button.
12. Review the printed report or the .pdf file. This report shows Members with ages over 18 and a value for their grade. The age and grade for each Member are shown toward the right side of the report.
13. Manually make updates to the grade and type on the individual Personal screen in the Member area of the program for people appearing on this report as desired.

(see next page for Grade Promotion process)

Grade Promotion process:

1. Open Church Office.
2. Click on Processes at the top of the screen.
3. Click on the Member Processes icon.
4. Click on Member Processes in the blue column on the left side of the screen.
5. Click on Grade Promotion.
6. Enter the beginning grade level or select it from the drop-down list.
7. Enter 12 as the ending grade level.
8. Mark the checkbox for “Change the type for those currently in the last grade listed below from Child to Young Adult”. A pop-up box will appear stating “Members changed from Child to Young Adult will not be promoted next year. Continue?” Click on the Yes button on that pop-up box.
9. Mark the radio button for “Active and Inactive”.

The system should be displaying the promotions such as: Grade K to 1, Grade 1 to 2, Grade 2 to 3, etc.

The bottom line of the list should have 12 in both the “Promote From Grade” and “Promote To Grade” columns with the “Change Type to Young Adult” checkbox marked.

10. Click on the Next button. The system will build a Grade Promotion List. The Member Type column shows a preview of the type value after the promotion.
11. Review and modify the list as desired by unmarking and re-marking the “Selected” checkbox for individual Members.
12. Click on the Next button.
13. Verify that the “Print a list of the information posted.” checkbox is marked.
14. Click on the “Promote Members >” button to perform the actual promotion.
15. Print the List and keep a copy on file.

16. Review the age and new grade for each child on the list to confirm that the new grade seems appropriate.
17. Manually make updates to the grade on the individual Personal screen in the Member area of the program for people whose grades don't seem appropriate.